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NEW SOUTH WALES.

BUSINESS STATISTICS - FEBRUARY, 1945.

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PART I PRIMARY AND EXPORT INDUSTRIES.

SEASON. Following upon the best rainfall for five months in January (illustrated by the rainfall index table appended) there were good rains along the Coast and in the north-eastern quarter of the State in the second and third weeks in February. Further heavy falls in the last mentioned section late in February are regarded as having afforded complete relief there and a lush growth of pastures is expected. Elsewhere in the central wheat and sheep districts rainfall has been patchy and many localities are still enduring drought conditions, which still prevail almost uniformly throughout the Western Division.

RAINFALL INDEX - N.S.W.

Weighted average ratio of actual to normal rainfall.
Normal rainfall each month = 100.

Month	Sheep		Wheat Districts		Dairying (Coastal) Districts	
	1943-44	1944-45	1943-44	1944-45	1943-44	1944-45
July	67	70	83	53	6	148
Aug.	105	142	103	90	156	234
Sept.	116	31	122	26	128	65
Oct.	90	52	83	73	147	34
Nov.	170	41	171	45	209	56
Dec.	50	37	32	42	176	50
Jan.	45	114	28	127	178	70
Feb.	58		32		37	
Mar.	41		49		50	
Apr.	61		80		28	
May	127		135		59	
June	16		14		57	

GENERAL. The Department of Commerce and Agriculture has sponsored the manufacture of agricultural machinery and implements of a value of £9.1 m. and expects production of these in 1944-45 to reach £7 m. It is stated that a record number of tractors is being imported but these will not suffice to meet all accumulated orders.

In New South Wales 4,500 cereal growers have been made interim payments totalling £245,000 under the Drought Relief Act, vide an official statement of Feb. 27, 1945.

WOOL. According to a Press report the British Wool Control has sold 15,000 tons (equal to 5.5 million skins) of Australian sheepskins to France. France was the predominant pre-war market for sheepskins, and imported 10.2 million skins with wool direct from Australia in 1938-39. Wool has also been released to Spain and Portugal.

Lack of shipping, amongst other factors, has prevented regular marketing of Argentine wool. A trade statement gives Argentine unsold stocks at the end of last season as equivalent to 1.69 m. Australian bales. World stocks of wool, without this season's clip are thought to be about equal to one pre-war annual clip.

Up to Feb. 23, 1945 the quantity of wool received in Sydney this season was 789,254 bales and to that date 728,476 bales had been appraised. At the same stage of last season the quantities were 917,115 and 806,632 bales respectively. In Australia 1,994,000 bales were appraised between July, 1944 and January, 1945 and in the same period exports of wool were 1,007,192 bales.

WHEAT. It has been stated officially that increased quantities of super-phosphate will be available this season. The State Dept. of Agriculture is seeking the sowing of 4 m. acres of wheat and 1 m. acres of oats (alternatively wheat where seed oats are unobtainable) in 1945.

Deliveries to the Australian Wheat Board of 1944-45 wheat were $38\frac{1}{2}$ m. bushels (about $1\frac{1}{2}$ m. bus. below previous estimate), and the actual quantity available for 1945 was 89 m. bushels (not including $14\frac{1}{2}$ m. bus. committed for export).

DAIRYING INDUSTRY. The improvement in butter production in N.S.W. appears to have been halted, and had not come up to expectations. Pastures in coastal dairying districts should continue to improve as the result of recent rains.

All restrictions on the sale of milk in Sydney and Newcastle were lifted as from March 1, 1945, supplies of milk having increased following upon rains averaging one to $1\frac{1}{2}$ inches in the Hunter and Manning, Metropolitan and South Coast districts in the second and third weeks of February.

PART II FINANCE AND TRADE.

GENERAL. The prospective appointment of Trade Commissioners at Calcutta, Bombay and Ceylon is stated to inaugurate a policy of extending the system of Australian oversea trade representation.

The Chairman of the Rationing Commission has stated that a relaxation of food and clothing rationing in Australia may not be expected during 1945.

RETAIL TRADE. The value of sales in a group of large shops in Sydney was 6.1 per cent. greater in December, 1944 than in Dec. 1943, when, in turn, there was an increase of 5.4 per cent. compared with Dec., 1942. In October and November, 1944 sales were 5.6 and 10.6 per cent. respectively above the value in the corresponding months of 1943.

In the aggregate, stocks were 4.6 per cent. greater in value than in Dec., 1943 when they were 12.8 per cent. less than a year before.

Over the year 1944 sales exceeded those in 1943 by 3.2% but there were decreases in the value of sales of 5.3 and 11.3 per cent. in 1942 and 1943, respectively. The average value of stocks of these traders rose in 1941 and 1942 and subsequently declined appreciably in 1943 and only slightly in 1944. The trend in retail prices has affected both sales values and the value of stocks significantly over the war years.

RETAIL TRADE - EXPERIENCE OF LARGE SYDNEY STORES.

Percentage Increase (+) or Decrease (-) from corresponding period previous year.

	July	August	Sept.	Oct.	Nov.	Dec.	Year
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Value of Sales.

1941	(+)	10.5	(+)	16.3	(+)	20.5	(+)	18.1	(+)	7.4	(+)	4.8	(+)	14.6
1942	(-)	15.6	(+)	5.7	(-)	7.0	(-)	17.3	(-)	16.3	(-)	23.1	(-)	5.3
1943	(-)	25.5	(-)	20.7	(-)	11.5	(-)	9.9	(-)	1.7	(+)	5.4	(-)	11.3
1944	(+)	3.8	(+)	11.8	(+)	3.7	(+)	5.6	(+)	10.6	(+)	6.1	(+)	3.2

Value of Stock.

1941	(+)	11.1	(+)	9.5	(+)	10.5	(+)	13.9	(+)	16.2	(+)	21.5	(+)	8.0
1942	(+)	14.7	(+)	13.4	(+)	5.9	(+)	2.1	(-)	1.2	(+)	1.5	(+)	9.2
1943	(-)	7.7	(-)	11.4	(-)	10.0	(-)	9.1	(-)	10.1	(-)	12.8	(-)	8.8
1944	(-)	0.4	(+)	4.2	(+)	5.0	(+)	4.3	(+)	4.4	(+)	4.6	(-)	0.2

There were increases in sales in each major group of merchandise other than boots and shoes (-4%) and food and perishables (-1.1%) compared with Dec. 1943. Notable amongst these were sports and travel goods (+24%) Miscellaneous (+12.3%) Men's and Boys' wear (+10.4%) and furniture, etc, (+9.1%).

At the end of 1944 stocks of all items of apparel, excepting fancy drapery and boots and shoes were appreciably greater than a year before. As regards footwear the position appears to have become increasingly difficult; Dec. to Dec. movements in sales were 1942, -18%; 1943, +26.2%; 1944, -4% and the corresponding changes in stocks were -16%, -14% and -25.3%.

RETAIL TRADE - SALES BY LARGE SYDNEY STORES.

Percentage movement from same month in preceding year.

Month	Wearing Apparel.					Household Piece Goods	Furniture and Hardware
	Dress Piece Goods	Women's Wear	Men's & Boys' Wear	Boots & Shoes			
1943-Dec.	(+) 38.6	(+) 26.9	(+) 26.2	(+) 19.7	(-) 19.8	(-) 24.5	
1944-July	(+) 12.0	(+) 10.2	(+) 3.2	(+) 8.5	(-) 0.9	(+) 1.9	
Aug.	(+) 29.1	(+) 13.2	(+) 14.2	(+) 9.2	(-) 6.5	(+) 10.7	
Sept.	(+) 23.8	(+) 6.7	(+) 7.5	(-) 7.1	(-) 8.5	(-) 0.8	
Oct.	(+) 29.3	(+) 7.7	(+) 6.2	(-) 5.2	(+) 3.4	(+) 3.3	
Nov.	(+) 35.7	(+) 14.4	(+) 6.5	(-) 1.7	(+) 0.6	(+) 11.5	
Dec.	(+) 15.8	(+) 6.4	(+) 10.4	(-) 4.0	(-) 3.2	(+) 9.1	

NOTE ISSUE. Between the end of December and the end of January of this year notes in the hands of the public decreased by £9m. (to £178.2m.) whereas in the corresponding month of 1943-44 the decrease was only £1.2m. There had been steady expansion over the war period up to October last when notes held by the public were £182.7m.

It is believed that note hoarding exists on a substantial scale. Separate data of denominations of notes in the hands of the public are not available, but as the proportion held by banks is small relative to that held by the public, details for all notes outstanding are significant in this regard. Between August, 1939 and January, 1944 the value of 10s. and £1 notes rose by 163 per cent. while those of £5 and higher denominations increased by 440 per cent. Notes of £5 or less increased 171 per cent. and those of £10 or more increased 394 per cent. In January 1945 ten shilling and one pound notes comprised 35.7 per cent. of the total outstanding compared with 52.6 per cent. Aug. 1939. The movement between Jan., 1943 and 1944 conformed to this general trend.

AUSTRALIAN NOTES ISSUED AND NOT REDEEMED - DENOMINATIONS.

Denomination	August 1939		January 1940		January 1943		January 1944		January 1945	
	Value	Pro- portion	Value	Pro- portion	Value	Pro- portion	Value	Pro- portion	Value	Pro- portion
	£m.	%	£m.	%	£m.	%	£m.	%	£m.	%
10s.	4.2	8.7	4.3	8.3	6.2	5.0	7.3	4.4	8.0	4.1
£1	21.3	43.9	22.6	43.5	45.7	36.8	55.4	33.9	61.1	31.6
£5	12.2	25.2	13.5	25.9	43.6	35.1	59.9	36.7	70.8	36.7
£10	5.5	11.3	6.2	11.9	18.5	14.9	32.0	19.6	42.2	21.8
£20	.1	.2	.1	.2	.1	.1	.1	.1	.1	.1
£50	1.4	2.9	1.5	2.9	3.1	2.5	3.4	2.1	4.4	2.3
£100	2.5	5.1	2.6	5.0	4.3	3.5	4.5	2.8	5.9	3.0
£1000	1.3	2.7	1.2	2.3	2.6	2.1	.7	.4	.7	.4
Total	48.5	100.0	52.0	100.0	124.1	100.0	163.3	100.0	193.2	100.0

PART III INDUSTRY, TRANSPORT, ETC.

GENERAL. The Prime Minister announced on Feb. 28, 1945 that an increase in manpower allocations for civil activities before June next was expected to be made possible by events likely to occur before then. Meanwhile there could be no question of reducing the fighting services.

Actually the allocations for non-Services needs originally made for 1944-45 have been reduced. The revised allocations for Jan.-June, 1945, with the residue of the 1944-45 allocations unfulfilled at Dec. 31 1944 (where stated) shown in parenthesis, are as follow:-

Civil Buildings 4,500 (14,000); Rural Industries 8,000 (4,000); Transport, 5,000; Certain Essential Industries, 2,000; Health and Hospitals, 500; Miscellaneous Civil Industry, 2,000; Post-war Manufacturing, Conversion and Expansion 2,000; to increase production of Manufactures for Export 4,000 (8,000).

Sources of manpower for these allocations are chiefly nominated releases of service-men covering the residue of 45,000 decided upon in August, 1944, and transfers made possible by curtailment of Australian and United States services contracts.

EMPLOYMENT IN NEW SOUTH WALES. During December, 1944, estimated total employment increased by 1,200 to 780,900, comprising 526,400 males and 254,500 females. Compared with the peak of employment in December, 1941 (783,800), there has been a decline of 2,900, consequent on a loss of 30,100 males and a gain of 27,200 females. Since June, 1944, employment has risen steadily, giving an increase of 4,200 males and 4,100 females.

The number of persons in Government employ fell during December, 1944 by 1,300 (males 1,300 and females 300) to 196,300, the lowest since the peak of 202,400 in July, 1943, but was greater by 7,800 males and 21,200 females than in November, 1941.

With gains of 1,800 males and 1000 females during December 1944, private employment (584,600) reached its highest level since May, 1942 (586,000). It was, however, below the peak of December, 1941, with 35,800 fewer men and 6,400 more women.

NEW SOUTH WALES.Estimated Salary and Wage Earners Employed (Excluding Rural Workers and Household Domestic)
(Includes Civil Construction Corps in N.S.W.)

1 of nch	MALES			FEMALES			TOTAL		
	Govt. (C'th.State Local and Allied).	Private Employ- ers.	Total	Govt. (C'th.State, Local and Allied)	Private Employ- ers.	Total	Govt. C'th.State Local and Allied)	Private Employ- ers.	Total
	'000	'000	'000	'000	'000	'000	'000	'000	'000
39-July	136.5	393.4	529.9	19.4	148.6	168.0	155.9	542.0	697.9
41-Nov.	144.3	411.1	555.4	23.0	201.5	224.5	167.3	612.6	779.9
Dec.	146.4	410.1	556.5	23.4	203.9	227.3	169.8	614.0	783.8
42-Dec.	154.5	375.5	530.0	35.1	208.8	243.9	189.6	584.3	773.9
43-Nov.	153.9	366.2	520.1	47.0	208.3	255.3	200.9	574.5	775.4
Dec.	152.6	369.2	521.8	46.4	210.0	256.4	199.0	579.2	778.2
44-Nov.	153.4	372.5	525.9	44.5	209.3	253.8	197.9	581.8	779.7
Dec.	152.1	374.3	526.4	44.2	210.3	254.5	196.3	584.6	780.9

Factory employment continued to decline losing 200 males and 400 females during December, 1944, making a total decline of 11,700 from the peak in October, 1943, comprising 4,200 males and 7,500 females. With 213,700 males and 89,000 females, factories employed 54,900 more men and 29,700 more women than in July, 1939.

The usual seasonal expansion of Retail trade employment was evident during the month, gains of 1400 males and 1700 females being compared with 1500 males and 1800 females in December, 1943. Building and Construction increased a further 600 males, yielding a total improvement of 2400 since August, 1944, the lowest level in this group. In Professional and Personal Services, there were 300 more men and 400 fewer women, while employment in Transport and Communication declined 1400 males during the month.

Comparative particulars are given below:-

NEW SOUTH WALES.

ESTIMATED TOTAL EMPLOYMENT IN MAIN INDUSTRIAL GROUPS.
Thousands.

Month	Factory	Mining & Quarrying		Building & Construction		Transport & Communication		Retail Trade		Other Commerce & Finance		Professional & Personal Services.	
		M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.
1939-July	158.8	59.3	.					Not available.					
1941-Nov.	210.5	80.7	35.8	.2	50.5	.7	79.8	8.4	41.5	42.9	44.6	19.4	52.6
Dec.	213.2	81.8	25.8	.2	49.0	.7	81.8	8.4	41.2	44.3	42.6	19.2	52.3
1942-Dec.	215.7	91.1	24.9	.2	36.1	.7	79.9	10.6	31.9	41.9	35.7	21.0	44.5
1943-Nov.	218.1	96.2	25.0	.2	29.1	.7	80.9	13.3	28.2	38.3	33.8	20.8	44.1
Dec.	217.3	95.4	24.7	.2	28.8	.7	80.9	13.4	29.7	40.1	33.5	20.8	44.5
1944-Nov.	213.9	89.4	24.8	.2	26.8	.7	85.6	14.0	29.1	38.7	35.8	20.8	46.2
Dec.	213.7	89.0	24.5	.2	27.4	.7	84.4	14.0	30.5	40.4	35.6	20.7	46.5
													67.4

* Includes Allied Works projects. ϕ Includes Education, Health, Hotels, etc.

MANUFACTURING INDUSTRIES, N.S.W.

Continuing the wartime trend, there was further increase in factory activity in 1943-44, though, apart from the increase in the number of factories of 645, the increases for the year were not as great as in the preceding three years. In comparison with the year ended June, 1939 the statistics showed increases in the number of factories of 1,291 with the average number of employees 41 per cent., the amount of salaries and wages paid 110 per cent. and the net value of production 80 per cent. greater. Factory lands, buildings, plant and machinery in use at June 30, 1944 were valued at £152.8 m. compared with £120m. and £145.7m. in June of 1939 and 1943, respectively. Details are as follow:-

FACTORIES IN NEW SOUTH WALES.

Year ended June	Factories	Land, B'ldgs., Plant.		Employees incl. Working Proprietors ϕ			Salaries & wages Paid.	Gross Val. of Output	Net Val. of Prod'n. x
		Add'ns. & Renewals	Value at June 30	Male	Female	Total			
		No.	£m.	£m.	No.	No.			
1939	9,464	11.5	120.0	169,513	62,287	231,800	44.6	218.4	90.3
1941	9,919	11.8	130.4	195,945	71,935	267,880	57.8	285.9	115.0
1942	10,166	11.8	135.6	220,013	82,107	302,120	75.8	339.5	138.8
1943	10,110	15.6	147.5	225,855	92,462	318,317	88.9	373.5	153.6
1944	10,755	16.1	152.8	228,845	97,311	326,156	93.5	398.9	162.5
Increase %									
1939 to 1944	14	40	27	35	56	41	110	83	80

ϕ Average number during year.

x Value of output less that of materials and fuel used.

Government factories expanded activities only moderately during 1943-44. The relative growth in these and in private factories is illustrated as under:-

GOVERNMENT AND PRIVATE FACTORIES - NEW SOUTH WALES.

Year ended June.	Factories		Employees		Salaries and Wages paid.		Net Value of Production.	
	Gov't.	Private	Gov't.	Private	Gov't.	Private	Gov't.	Private
	No.	No.	000	000	£m.	£m.	£m.	£m.
1939	72	9,392	16.2	215.6	4.1	40.5	5.6	84.6
1942	118	10,048	28.4	273.7	9.2	66.5	12.1	126.7
1943	140	9,970	37.6	280.7	13.0	75.9	16.4	137.1
1944	145	10,610	39.6	286.6	13.6	79.9	16.7	145.9

Most of the wartime increase has been in the class "Metal Manufactures, Machines, Implements and Conveyances", which embraces most of the new Government factories established in the period. This is the predominant class in this State it includes rather more than 50% of all factory employees. In this group was found 5,200 of the total gain of 7,800 between 1942-43 and 1943-44. The Food etc. group gained 1,700, Clothing 700 and Chemicals, Paints, Soap etc. 500. The only major class recording a significant decrease was Textiles (not clothing) in which there was a loss of 1,100.

Comparison of number of employees and of net value of factory production in 1938-39 and each of the past two years by groups of factories is as follows:-

Groups of Factories Producing:-	Average Number of Employees during year. (a)			Net Value of Factory Production.		
	1938-39	1942-43	1943-44	£000	£000	£000
Metals, Machines, Implements and Conveyances	83,178	159,044	164,241	31,691	74,327	78,525
Food, Drink and Tobacco	29,298	52,030	34,361	16,106	20,330	21,260
Chemicals, Dyes, Paints						
oils, Soap.	8,195	11,337	11,836	6,393	9,259	9,658
Paper, Stationery, Printing Etc.	17,405	15,447	15,102	6,538	7,454	8,058
Heat, Light and Power	3,179	3,717	3,707	5,489	7,160	7,188
Clothing	32,414	31,940	32,671	6,227	9,132	10,047
Textiles (not clothing)	15,175	21,383	20,453	3,553	7,625	8,102
Building Materials, Furnishings etc. (class II, X & XI)	25,103	22,813	22,807	8,120	9,390	9,892
Other Products	17,853	19,956	20,978	6,149	8,905	9,816
Total	231,800	318,317	326,106	90,266	153,582	162,546

(a) Including Working Proprietors.

Average earnings of factory employees rose steeply during the war period, particularly in 1941-42 and 1942-43. The increases in successive years 1941-42 onward were, for males £42.3, £36.1 and £7.6, and for females £18.6, £22.4 and £13.9. Between 1938-39 and 1943-44, the average earnings of male employees increased by £113.1 or 48% and of female employees by £67.6 or 40%

AVERAGE SALARIES AND WAGES PER FACTORY EMPLOYEE. £

	1938-39	1940-41	1941-42	1942-43	1943-44
Male	£235.8	£262.9	£305.2	£341.3	£348.9
Female	£102.5	£115.2	£133.8	£156.2	£170.1
Person	£199.0	£222.3	£257.7	£286.5	£294.5

£ Based on the average time worked during the year; working proprietors excluded.

BUILDING INDUSTRY. In January, 1945 the value of private building permits granted in Sydney and suburbs was £145,037 compared with £66,001, and £110,369 in January, 1944 and 1943, respectively. With seasonal trend taken into account it appears that the tendency toward limited expansion of private building activity (still at a very low level) continues.

New Houses. Included in permits given in January 1945 were 67 for new houses (the greatest number for three years) of a total value of £42,540 compared with 8 for £2,608 in January, 1944. Trends in private house building are as follow:-

NUMBER OF PRIVATE PERMITS FOR NEW HOUSES - SYDNEY AND SUBURBS.

Year	Half year ended Calen- dar			Month of -						
	June	Dec.	year.	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.
1939	3,001	2,846	5,847	637	644	355	482	430	298	358
1942	202	30	232	1	6	7	4	8	4	5
1943	39	44	83	8	11	6	6	6	7	9
1944	99	252	351	33	42	32	42	52	51	67

Following year.

A Bill amending the Co-operation Act, provides for the granting of 100 per cent. loans by Co-operative Building Societies for new house building.

The number of new dwellings authorised or contracted for in the metropolis on Government account in January, 1945 was 30, compared with 117, 34, 66, 47 and 98 in successive months August to December, 1944. Under the Commonwealth quota scheme N.S.W. was to proceed with 1765 houses in April-Dec., 1944. At 31st December, 1944 there were 268 under construction, some of which have since been completed. In the whole Commonwealth the quota was 4,225 and of this number 1,148 had been commenced and 201 had been completed at the end of 1944. Progress is retarded by shortages of building labour and materials.

Government Building. Building contracts accepted and work authorised on Government account in N.S.W. totalled £324,000 in January, 1945, compared with £246,000 in Jan., 1944 and £191,000 in December, 1944. Of the amount £234,000 was to be expended in Sydney and Suburbs.

Total Building. Private building other than in the metropolis is available only quarterly. Other than this the total value of Government and private building in January, 1945 was £469,000 compared with £312,000 in January, 1944 and £349,000 in December, 1944. The comparative statement below indicates a recent tendency for Government building to decrease and for private building to increase.

VALUE OF PUBLIC AND PRIVATE BUILDING IN N.S.W.

(£ thousands)

Period.	Sydney and Suburbs.			Balance of State.			Total New South Wales.			
	Private	Govt.	Total	Private	Govt.	Total	Private	Govt.	Total	
Year	1940	11,718	894	12,612	4,487	2,672	7,159	16,205	3,566	19,771
	1943	1,361	3,109	4,470	508	1,211	1,719	1,869	4,320	6,189
	1944	1,603	1,757	3,360	867	1,093	1,960	2,470	2,850	5,320
Sept. Qr.	1944	436	542	978	257	386	643	693	928	1,621
Dec. Qr.	1944	495	432	927	258	283	541	753	715	1,468
1944	Jan.	68	198	264	(a)	48	(a)	(a)	246	(a)
	Dec.	158	153	311	(a)	38	(a)	(a)	191	(a)
1945	Jan.	145	234	379	(a)	90	(a)	(a)	324	(a)

(a) Not available.

TRANSPORT.

Motor Vehicles. An increase of 809 in the number of registered motor vehicles in January, 1945 may be compared with increases of 1,216, 1,459 and 2,012 in successive preceding months and of 1,061 in January, 1944. During January, 1945 the number of cars increased by 276 and of lorries and vans by 329.

First registrations during the month averaged only 5 cars and 38 lorries and vans per week, compared 3 cars and 70 lorries and vans per week in January, 1944 and 9 and 58 per week in December, 1944. These and the figures for total registrations indicate that, as in recent months, many laid-up vehicles have been returned to service again.

In comparison with the pre-war month of August, 1939 total registrations in January, 1945 (294,363) were 34,586 fewer in number. An increase of 3,185 in the number of lorries and vans was more than offset by the decrease of 31,993 in the number of cars on the register.

MOTOR VEHICLES REGISTERED IN N.S.W.

Vehicles.	At end of month.			Increase.			
	Aug. 1939. *#	July, 1942. #	Jan. 1945.	Oct. 1944.	Nov. 1944.	Dec. 1944.	Jan. 1945.
Cars	000	000	000				
Cars	216.6	170.0	184.6	528	657	864	276
Lorries and Vans	77.6	70.9	80.8	463	512	578	329
All Vehicles	329.2	267.4	294.4	1,216	1,459	2,012	809

* Pre-war peak. # Lowest war-time number of cars.